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USAID FIRMS PROJECT

Exit Strategy Development - Industry Sector

Marble & Granite, Agriculture Implements and Pilot Information Financial Mobile Solution

July 2014

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Abstract:

This report has been compiled for the development of an exit strategy for FIRMS project that was aimed at development of the Industry sector that included Agriculture implements sector, Marble & Granite sector, and PIFMS (pilot information financial mobile solution). The tasks of the consultant was to find out the constraints of the sector before intervention of FIRMS, to find out what FIRMS has done for each of the three sub sectors and what benefit have the beneficiaries (SMEs) got from these interventions. This data gathering was done by the consultant through personal visits to SME clusters located in the KPK, Punjab and Sindh provinces of Pakistan. An exit strategy based on: phase down, phase over, and phase out approaches was hence developed by the consultant. This exit strategy would ensure ways to achieve sustainability of the project interventions over a long period.

Acronyms

ITC	International Trade Commission
IVR	Interactive Voice Response
KPK	Khyber Pakhtunkhwa
M & G	Marble and Granite
PIFMS	Pilot Information Financial Mobile Solution
SME	Small and Medium Enterprises
SMEDA	Small and Medium Enterprises Development Authority
SOW	Scope of Work
TDAP	Trade Development Authority of Pakistan
UAE	United Arab Emirates
US	United States
USAID	United States Agency for International Development
USG	United States Government
VCD	Value Chain Development

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Executive Summary

In order to nurture competitiveness through technology up gradation, process improvement the USAID Pakistan launched Firms Project in 2009 to accelerate sales, exports, investment, and job growth in targeted sectors. Firms project was designed to help create dynamic and internationally competitive private sector that create more jobs to help undercut the basis of extremism. After completing five years of activity, the Firms Project is expected to close its operations in December 2014 now seeks strategy to exit from its interventions.

International models suggests following key elements to be undertaken before withdrawal of project interventions.

1. Fulfillment of its promised commitments.
2. Supporting promising areas identified during the project intervention through phase over
3. Sustainability model through involving indigenous institutional spread that ensure continuity of the projects interventions

Firms project has to cater for technology needs in M&G sector, establish key components of PIFMS in Swat and some soft interventions in all three sub-sectors of the industry sector.

Background of Industry Sector

This section discusses all three industry sectors including Agricultural implements, Marble and Granite, PIFMS.

Agricultural implements and tools are being manufactured in Punjab, Sindh and Khyber Pakhtunkhwa. There are around 500 small and medium size manufacturing units in Punjab, with Faisalabad, Daska, Okara and Mian Chunnu being the major clusters, around 250 SMEs in Sindh and KPK.

The sector is confronted with number of constraints that include, raw material availability, access to capital, tax burdening as last year 16% GST was imposed on agricultural implements, while the GST on the sales of tractor is 5%, expensive and irregular supply of electricity, no support from government, no access to new markets, shortage of skilled labor (specifically in Daska cluster)

The world trade market of agricultural implements is over US\$ 4 billion for specialized category and around US\$ 500 million for non specialized category. Pakistan products in agricultural implement sector mainly fall in the non specialized category.

Intervention of Firms project in this sector has considerably increased the sector in all envisaged areas of export orientation, employment generations, cost control and firms level efficient practices. Major interventions are complete in this sector while those remaining

Pakistan's annual production for marble and granite in the year 2012 was estimated to be 3.22 million tons. Exports are estimated to be 3% of the total production while the rest is consumed locally. Standard squared block extraction is still a dream for marble and granite stakeholder as very few quarries in Pakistan have the capability of extracting squared block. More than 95% mine owners are still using orthodox un-wieldy, indiscriminate blasting technique resulting in quarrying waste and over burdening. This sector is yet to avail input relating to technology up-gradation and export orientation, though some sporadic efforts were undertaken by the project team to introduce the SMEs of this sector

Pilot for Information Financial Mobile Services PIFMS sector

Firms Project had been tasked to conduct a pilot to introduce services and products to beneficiaries supported under its interventions for the peach and potato clusters in Swat, Khyber Pakhtunkhwa. The pilot had included broadcasts of agricultural information anywhere in Pakistan where there was mobile coverage using cellular phones.

The pilot's implementation plan included broadcasting information through interactive voice response (IVR). Additionally, the pilot supported establishment of Information and Trading Centers, to promote products, elicit feedback, collect data, and disseminate information. Furthermore, mobile technologies, and the introduction of 'Easy paisa' mobile accounts, provide users the capability to carry out transactions on mobile phones anywhere in Pakistan where there is mobile coverage.

Methodology

Secondary research that included desk review and browsing at net to find out similar assignment with USAID projects in other countries was followed by individual interviews of the beneficiaries and focus group discussion with the stakeholders. International consultant Mr. Drew Schneider was provided with the reports on the required templates. Additionally following were considered in compiling the document at each stage of its development;

Analyzing the exit strategies, devised by other successful national and international projects of USAID in economic growth sector / private sector development / value chain development to have an idea of contents and subject matter addressed. Identified the key elements of the program that need to be considered while devising the strategy document focusing on specific intervention that has the potential to sustain in the times to come. Developed the overall structure and framework of the exit strategy document in consultation with the beneficiaries and reported to the international consultant on his given templates. Identified the services/benefits of the project all the industrial sectors viz a viz M&G, Agri Implements and PIFMS that have the potential for sustenance without the project's inputs and identified other service provider, development agents who could be made responsible for provision of set of services after withdrawal of USAID Firms project.

Beneficiaries' sense of ownership/commitment was evaluated through direct interview and group discussion with them and their capacity to continue program activities beyond the life of the project was ascertained. Institutional mapping at national / provincial / district / sector level that could become responsive to the needs of a sector's beneficiaries was done in addition to specifying the most useful ongoing USAID support in each of the sectors and how it could be funded after the end of project.

A list of organizations (business / governmental / non-governmental) working for the development of these sectors in Pakistan, and provide a critical analysis of their current role and capacities to undertake similar work was provided to the international consultant that could help in devising the exit plan.

M&E is an embedded concept and constitutive part of every project or program design and is very important from various perspectives in the project life and its process of Phase over and phase out. This concept is elaborated in the report in its relevant section.

Findings

Agricultural Implements Manufacturing in Punjab, marble and Granite Processing and Manufacturing in all the provinces and PIFMS in Swat were undertaken besides other sectors by the Firms project. The project's interventions have progressed fairly well along the VCD sustainability in some of these sub sectors of the industry sector. Agriculture implements sector was found progressing with commendable results where all the required interventions were

carefully crafted while it remained lagging behind in improving processes and processing practices in the M&G sector throughout the country. Similarly PIFMS couldn't bear fruit due to bureaucratic snags and stopping of further intervention in Swat.

Next Steps

The first important step is finalizing sector-level exit plans. Template for this plan is available in annex A (as given in the final report of principal consultant Drew Shnieder)

The sector level exit plan template is supported with detailed instructions for using the template to complete sector-level exit plans. The plan has been elaborated by the principal consultant Mr. Drew Schnieder in the annexure.

1. Introduction

In order to nurture competitiveness through technology up gradation and process improvement, the USAID Pakistan launched Firms Project in 2009 to accelerate sales, exports, investment, and job growth in targeted sectors. Through value chain at firms level to overall policy and regulatory environment, Firms project was designed to help create dynamic and internationally competitive private sector that create more jobs to help undercut the basis of extremism. After completing five years of activity the Firms Project is expected to close its operations in December 2014 and is now seeking strategy to exit from its Value Chain Development (VCD) interventions.

While studying international models and similar project interventions reaching the stage of exit and adapting strategies and plans to put in place for smooth running of project interventions after the withdrawal of those specific initiatives, the following key areas are common in practice.

1. Fulfillment of the project promised commitments with the beneficiaries
2. Supporting promising areas identified during the project intervention through phase over
3. Sustainability model through involving indigenous institutional spread that ensure continuity of the projects interventions

Firms has to fulfill its commitment to the target beneficiaries in the short span of remaining five months which seems very challenging specifically in Marble and Granite and PFIMS sectors. In the M&G sectors, major intervention of technology up-gradation is yet to take place as none of the 08 SMEs promised for supply of various advanced machinery items are entertained. This must be completed within the remaining period to ensure sustainability and the positive change as envisaged in the beginning of the project interventions. PIFMS is restrained by the government for furthering its initiative in the planned geographical location that need to be dealt with by involving trade bodies and industry associations.

1.1 Background of industry sector

1.1.1 Agriculture implement Sector

Agriculture implements cover a very wide range of products with different functions, design and configuration along with wide range of pricing. The categories can include Tillage implements; Land and Seedbed preparation implements and tools; sowing implements; plant protection implements; harvesting, reaping and thrashing machines; Processing and value addition machinery & Transportation etc.

Agricultural implements and tools are being manufactured in Punjab, Sindh and Khyber Pakhtunkhwa. There are around 500 small and medium size manufacturing units in Punjab, with Faisalabad, Daska, Okara and Mian Channu being the major clusters, around 250 SMEs in Sindh and KPK.

Value chain of agricultural implements is not very complex, the final product reaches end customer after changing a few hands and going through a few value addition stages, starting from the suppliers of raw materials to standard parts manufacturers, who serve as vendors as well as assemblers, and finally to fabrication/assembling units from where they are sold to exporters and farmers.

Up until now, agriculture implements manufacturing units are practicing crude and rudimentary manufacturing processes under highly nonprofessional management. There are however sector specific government institutions that facilitate the sector in productivity in different operational functions, these include Center for Agriculture Machinery and implement in Mian Chanu that was established with financial assistance of Dutch Government, Farm Machinery Institute Islamabad, Agriculture Machinery Research Institute Multan, Agriculture Mechanization Research Cell (Tando Jam Sindh), PCSIR Center Daska.

The sector is confronted with number of constraints that include, raw material availability, access to capital, tax burdening as last year 16% GST was imposed on agricultural implements, while the GST on the sales of tractor is 5%, expensive and irregular supply of electricity, no support from government, no access to new markets, shortage of skilled labor (specifically in Daska cluster)

The world trade market of agricultural implements is over US\$ 4 billion for specialized category and around US\$ 500 million for non specialized category. Pakistan products in agricultural implement sector mainly fall in the non specialized category.

Pakistan is exporting farm machinery and agricultural implements to neighboring Afghanistan and to quite a large number of African countries including Nigeria, Kenya, Tanzania, South Africa, Morocco, Ghana and regional countries including Bangladesh, and UAE etc. In the export market, Pakistan is operating in the lower price segment. Pakistan exported worth of US \$ 7.5 million to Afghanistan, Sri Lanka, Bangladesh, Nigeria, Sudan, and other countries in 2009. India, China and Turkey are the major competitors in the markets where Pakistan is operating. There is also export of parts used in agricultural implements to companies in Europe.

It was also observed that majority of the manufacturing units do not have websites, marketing collateral, and product branding. The prevalent marketing and sales system of agricultural implements can be termed as a combination of push system and pull system based on referral. The farmer or end user visits the manufacturer to buy the implements usually based on referral.

1.1.2 Marble and Granite Sector

Nature has blessed Pakistan with a variety of valuable and attractive colors of marble & granite in almost all its provinces. More than one hundred colors and shades of these stones have so far been explored that is more than any single country around the globe. Pakistani stone material is in high demand in the local and international markets. Marble produced with the brand name of “Ziarat white” is a high value item in terms of its per square foot price, besides new varieties of recently found momand white. Black granite of Mansehra and Oghi is a unique variety with fine texture and grandeur lust and is traded at considerable high price in the market, usually termed as black gold. The demand for dimensional stone is enjoying a rising trend throughout the world. According to ITC Trade map, the international trade for marble and granite for year 2012 was \$ 28.5 billion.

Onyx found in Baluchistan and coastal region of Sindh is yet another very unique and rare material in the world with its color starting from light to deepest green tinge. The big mass of Onyx is extended to Iran and Afghanistan making a triangular formation but the colors found in Pakistani sides of this triangle witnesses general likeness among the customers. For ease of general understanding onyx falls in the marble & granite category.

Pakistan's annual production for marble and granite in the year 2012 was estimated to be 3.22 million tons. Exports are estimated to be 3% of the total production while the rest is consumed locally. Standard squared block extraction is still a dream for marble and granite stakeholder as very few quarries in Pakistan have the capability of extracting squared block. More than 95% mine owners are still using orthodox un-wieldy, indiscriminate blasting technique resulting in quarrying waste and over burdening. Most of the quarries have huge reserves of most demanded attractive colors are closed due to overburdening. Most common issue with dimensional stone extraction is most frequent closure of mining operations due to local issues caused by interest groups, extremists etc. This causes halt in consistency in supplying raw material to the processors causing a vicious cycle.

Among the marble processing clusters are Shabqadar- subhankhwar in Charsadda District of KPK, Warsak Road in Peshawar District KPK, Nowshera and Mardan Districts-KPK, Khyber, Bajaur and Momand agencies-FATA, Islamabad, Mangopir Karachi-Sindh. In addition to these clusters small groups and sporadic spread of individual units are found all over the country. Processing is mainly done on locally manufactured non calibrated machinery resulting in low quality product with thickness variation of more than 3 mm. Standard acceptable variation in marble and granite tiles is 0.5mm while for the slab it is 1.0 mm. The product thus cannot be exported.

Units productivity is suffered due to the irregular shape of raw blocks usually yielding 70-80 feet per ton while in the contrary squared block provide the yield of 120-130 feet per ton. Another constraint in exporting the processed stones is the capacity of the units, average capacity of production per unit is around 30,000 square feet or 2804 square meters per month. Almost all processing units are not energy efficient, the machinery in use in these is not designed by qualified engineers who could work out cutting tips relevance to the hardness of the stone and optimal RPMs for the electric motors driving the cutters. Significant amount of energy is also wasted due to wiring losses as poor connectivity, loose wiring and makeshift arrangements is the norm in the industry.

1.1.3 Pilot for Information Financial Mobile Services PIFMS sector

Firms Project had been tasked to conduct a pilot to introduce services and products to beneficiaries supported under its interventions for the peach and potato clusters in Swat, Khyber Pakhtunkhwa. The pilot had included broadcasts of agricultural information anywhere in Pakistan where there was mobile coverage using cellular phones. The “Pilot for Information and Financial Mobile Solutions” is a joint program of USAID’s Firms Project, Telenor Pakistan and Government of Khyber Pakhtunkhwa.

This intervention was intended to benefit rural communities involved in the horticulture value chains whose livelihoods depend on growing and trading these high-value crops. Direct beneficiaries in the pilot program will be the farmers in the 11 peach clusters, six potato clusters and 22 fish farmers in Swat.

The pilot’s implementation plan included broadcasting information through interactive voice response (IVR). Additionally, the pilot supported establishment of Information and Trading Centers, to promote products, elicit feedback, collect data, and disseminate information. Furthermore, mobile technologies, and the introduction of ‘Easy paisa’ mobile accounts, provide users the capability to carry out transactions on mobile phones anywhere in Pakistan where there is mobile coverage. With ‘Easy paisa’ services farmers will be able to collect their payments and make other transactions through mobile accounts. SMS service to the beneficiaries on pre and post harvest instructions are test started with positive response but the information relating to weather, trade/ market information from Peshawar and D.I. Khan markets, and that of financial services is yet to be organized and made operational. All the interventions of Firms project are put on halt in Swat due to security situation.

2. The Exit Strategy

2.1 Purpose

The general purpose for development of the exit strategy and the exit plan is to keep the sectors moving on the development path even after the withdrawal of the project interventions. The planned withdrawal in September 2014 is in dire want of developing the strategy document arresting all possible avenues of support to the concerned sectors in all the areas of interventions in the value chain so that they could play their roles in, phase over and phase out of the project components. The study should entail following objective of the USAID Firms project;

- a) Demonstrate sustainability of the interventions, initiated by USAID Firms Project during its implementation period.
- b) Scalability (scale-up) and replication of the successful interventions for larger number of beneficiaries in these ten business sectors, by other development agencies / bodies
- c) Replication of the tested/proven development model to similar sectors, by USAID and /or other development agencies through their subsequent projects

2.2 Objectives

The objective of this consultancy is to work under the guidance and direction of international lead consultant for undertaking secondary and primary research, field work and other associated tasks to develop exit strategy for the following business sectors of VCD component: Marble and Granite Processing, Agricultural Implements Manufacturing and Pilot for Information and Financial Mobile Solutions; encompassing all those activities that should be undertaken by Firms Project, and USAID for its upcoming projects to ensure sustainability, replication, and scalability

2.3 Scope of the Impact Assessment

Under this consultancy, the consultant will performed all of the tasks and activities given in section 5, either clearly mentioned in this document or implied.

- a) The consultant will undertake the primary and secondary research including reviewing of the project documents (list is given in Annexure B) to identify the project's objectives, implementation modalities, development model followed; and interventions initiated by the project.
- b) The consultant will work under the guidance and control of international consultant and will provide assistance in each activity / assignment, required for developing the exit strategy document for three industrial sectors.
- c) On need basis, the consultant will visit various locations in Pakistan to meet the Project COR, respective team members of VCD, project beneficiaries and various stakeholders of the sectors, as and when suggested by the international consultant and supervisor of the consultancy, to get their feedback and insights.
- d) The consultant will undertake the tasks given in section 5 for development of a comprehensive exit strategy, or any other task assigned by international consultant.
- e) The consultant will submit the deliverables on the format / template provided by supervisors.

3. Study Methodology

3.1 The Study

Secondary research that included desk review and browsing at net to find out similar assignment with USAID projects in other countries was followed by individual interviews of the beneficiaries and focus group discussion with the stakeholders. International consultant Mr. Drew Schneider was provided with the reports on the required templates. Additionally following were considered in compiling the document at each stage of its development;

Analyzed the exit strategies, devised by other successful national and international projects of USAID in economic growth sector / private sector development / value chain development to have an idea of contents and subject matter addressed.

Identify the key elements of the program that need to be considered while devising the strategy document focusing on specific intervention that has the potential to sustain in the times to come.

Developed the overall structure and framework of the exit strategy document in consultation with the beneficiaries and reported to the international consultant on his given templates.

Identified the services/benefits of the project all the industrial sectors viz a viz M&G, Agri Implements and PIFMS that have the potential for sustenance without the project's inputs and identified other service provider, development agents who could be made responsible for provision of set of services after withdrawal of USAID Firms project.

Beneficiaries' sense of ownership/commitment was evaluated through direct interview and group discussion with them and their capacity to continue program activities beyond the life of the project was ascertained.

Institutional mapping at national / provincial / district / sector level that could become responsive to the needs of a sector's beneficiaries was done in addition to specifying the most useful ongoing USAID support in each of the sectors and how it could be funded after the end of Firms project.

A list of organizations (business / governmental / non-governmental) working for the development of these the sectors in Pakistan, and provided analysis of their current role and capacities to undertake similar work was provided to the international consultant that could help in devising the exit plan.

Macroeconomic context, key trends, policy and regulations of all the three sectors was analyzed, along with challenges and issues being faced by the firms operating in these sectors.

Public / private sector organizations / partners that can carry forward the project's interventions in the given macroeconomic and microeconomic contexts were identified with their capacities for specific desired tasks, and the list was shared with the international consultant.

Mapping of industry association, chamber of commerce, trade bodies, etc was done that can act as advocacy forum for promoting Firms Project's interventions / development model.

Exit document template developed by the international consultant was filled accordingly mentioning the exit stages and the services that need to be strategized with the concerned partners while keeping mind market driven / market led measures rather than community driven / community led approaches.

Taking into account the above analysis and assessment, prepared an exit strategy including detailed exit Plan for the remaining project time was imbedded in the templates provided by the international consultant to be reflected in his final report. This plan is available in annex A.

Institutional mechanism for sustainability of project's interventions after project closure as to how project should withdraw its resources while protecting its achievements and ensuring continued progress toward its goals is given in the recommendation section.

Mechanisms for strengthening the business sectors' associations / bodies / business development services providers / related governmental and non-governmental organizations; who can take the ownership and can assist / facilitate the replication of the workable and tested interventions to other players / business sectors was also shared with the international consultant for inclusion in the final report.

Financials are worked out to ascertain the required funds for making it convenient for leveraging and sustainability of the project interventions.

Role and Responsibility of Partner Organization

For the implementation of the exit strategy, institutions were identified with their proposed role and capacity for delivering the desired services to the beneficiaries of the Firms project. The list of these institution is annexed.

Risks and Assumptions

Agri Implements sector

- It is feared that most of the SMEs intervened by the project in Faisalabad and Daska would not be completing their production facilities restructured according to the lean principles. This activity thus may end up pre mature which may result in bringing back these SMEs to a square one position.
- The spinoff as expected within the clusters of Faisalabad and Daska may not take place as envisaged by the project due to business secretes the SMEs feels for their own entity is more important than promoting others.

Marble and Granite Sector

- Time shortage in purchase and installation of machinery is a definite risk in completing the desired intervention.
- There is a poor institutional infrastructure available in the M&G sector that can be trusted for the phase over of the project activities.
- The Associations in both the mining and processing are quite weak and poised by non-productive politics.

Pilot for information and Financial

- Ban from the government on firms activities in Swat.

Financial requirements to implement exit strategy

Institutional Support to Associations/ Chamber/ TIC						
S.No	Cost Heads	Qty	Rate PKR	Monthly	Yearly	Total(for 2 years)
1	Salary for coordinator	3	60000	180000	21600000	4320000
2	Other benefits	1	50000	50000	600000	1200000
3	Computer	3	75000	0	0	225000
4	Printer	1	20000	0	0	20000
5	Travelling (petrol 300 lit/ month)	3600	105	378000	4536000	9072000
6	Stationary	1	1000	1000	12000	24000
7	Miscellaneous	1	5000	5000	60000	1200000
	Sub Total				7368000	16061000
Marketing Support						
S.No	Cost Heads	Qty/ partici pants	Rate PKR	Per Exhb	Total	
1	AgraME exhibition Dubai (2 Exhibitions)	10	300000	3000000	6000000	
2	M&G Big 5 Exhibition Saudi Arabia (2 Exhb)	8	300000	2400000	4800000	
3	M&G Qatar Project (2 exhb)	8	300000	2400000	4800000	
	Sub Total				15600000	
	Total				20714000	36775000

A total sum of PKR 36.7 million or \$0.37m will be required to support the exit plan which will gradually be taken over by the concerned business associations/ chambers and exhibition by TDAP. Even during the USAID support, period office space and utility charges will be borne by the concerned association/ trade body or chamber of commerce and industry where the coordinator will be housed.

The amount is not inclusive of the cost of marble and granite sector planned purchase of machinery. It was not worked out as it varied with type of machinery item and the specific SME requirements.

3.2 Monitoring & Evaluation

M&E is an embedded concept and constitutive part of every project or program design (“must be”). M&E is not an imposed control instrument by the donor or an optional accessory (“nice to have”) of any project or program. M&E is ideally understood as dialogue on development and its progress between all stakeholders.

In general, monitoring is integral to evaluation. During an evaluation, information from previous monitoring processes is used to understand the ways in which the project or program developed and stimulated change. Monitoring focuses on the measurement of the following aspects of an intervention:

- On quantity and quality of the implemented activities (outputs: What do we do? How do we manage our activities?)
- On processes inherent to a project or program (outcomes: What were the effects /changes that occurred as a result of your intervention?)
- On processes external to an intervention (impact: Which broader, long-term effects were triggered by the implemented activities in combination with other environmental factors?)

Evaluations should help to draw conclusions about five main aspects of the intervention:

- Relevance to the Firms project envisaged plan
- Effectiveness in carrying the objective of sustaining the project components
- Efficiency in carrying out the planned task by the new arrangement
- Impact that is visualized in the increase of revenue of the firm and creation of employment.
- Sustainability of the project by introducing best practice model to each and every firm in the clusters in Agri Implements, Marble and Granite and Peach in Punjab, nationwide and in Swat respectively

Information gathered in relation to these aspects during the monitoring process will provides the basis for the evaluative analysis.

The evaluation process is an analysis or interpretation of the collected data which delves deeper into the relationships between the results of the project/program, the effects produced by the project/program and the overall impact of the project/program.

3.3 Sample Size Calculation

Almost all beneficiaries in Marble and Granite sector were visited while in Agricultural Implements eight out of eighteen beneficiaries making up to 44% were visited in Faisalabad and Daska. In PIFMS, a group of potential exporters was met in Rawalpindi during their training session in a local hotel.

3.4 Study Instruments

Direct interviews of the beneficiaries and focused group discussions remained the key study instrument. Almost all beneficiaries in marble sector were interviewed and their opinions were solicited about the program. Around 44% of 18 SMEs, while 80% of the old cases 10 SMEs in light engineering, agriculture implements sector were interviewed in Dask and Faisalabad. In PIFMS sector FGD was held in Islamabad where the SMEs of the peach sector were having their training session in a local hotel.

SMEs Sectors	Locations	PIFMS	Marble Sector	Agriculture Implements Sector	Total Covered
	Islamabad	11	3	0	14
	Peshawar, Charsadda	0	4	0	04
	Lahore, Daska, Faisalabad	0	1	8	09
	Karachi	0	4	0	04
Total		11	12	08	31

A focused group session was held with cluster leaders of 11 clusters representing Swat peach sector, who received training on the use of mobile phone to benefit from the messaging program for pre and post harvest treatment of peach.

3.5 Quality control

The report in different templates was checked with the international consultant at various stages of its development. The content of this report are based on the deliberation with the beneficiaries in interviews with them and focused grouped discussion. What the consultant picked out of these discussion was cross checked with the beneficiaries/ interviewee before giving it a final shape.

3.6 Limitations of the Study

Visit of Swat peach sector clusters was not made due to government intervention impeding meeting these key players in Swat. Meeting was held with them in Islamabad but was not that fruitful as it otherwise could have been there in Swat. Time constraint kept us away from covering all SMEs in agriculture implements sector, however those visited virtually represented the total population.

Planned intervention in marble and PIFMS were not complete keeping the interview limited to speculations instead of actual results.

4. Study Findings

4.1 The Industry Sector:

Agriculture Implements Sector

Key Constraints

Processing-Level

Awareness and Capacity constraints in the sector as a whole

Lack of know how in using appropriate machinery and equipment that will help improving their productivity.

High cost on fabricating implement due to low efficiency of machinery and equipment

Irregular supply of Electricity resulting into long hours of power shut down

High energy consuming welding plants with low production

There is lack of on the job training

Workers generally lack basic skills in quality control and safety measures.

General lack of material selection that escalates

Sectoral shift of labor specifically for SMEs in Daska as it is close to Sialkot where more promising SMEs with potential of making better pay is available.

Improper marketing of products both in the local and international markets

Cut throat competition resulting in subsistence level in monetary return

No promotional efforts in marketing the products on web and other sources

1b. USAID FIRMS Project Engagement

FIRMS is assisting 18 SMEs in Faisalabad and Daska. The program objective is to increase the economic value of project-assisted SMEs with improvement in their manufacturing processes resulting in optimal production with improved product quality for local and export markets

Planned Program Elements

SMEs are provided with Welding plants, Air Compressor, Press for straightening, material hardness tester and gauges. In addition, they are provided with 1. Advisory support for improving the business through placing the production floor in order by introducing lean program and providing on the job training on machinery and equipment provided to the SMEs . 2. Providing the client some essential machinery, equipment and tools as mentioned above, that will improve the productivity at optimal scale. 3. Exposure to SMEs through visits to local best practice firms like Atlas Honda/ Infinity/ GTDMC/Beco Engineering. And to participate in the international exhibition and specially tailored meeting visits to the production sites of benchmark countries.

Marble and Granite Sector

Key Constraints

Processing-Level

- Non-availability of the selected marble variety in the required quantities
- In-consistency in product supply for the desired color of stone
- Time lines for the product availability cannot be worked out.
- Non calibrated machinery

- Loose foundations resulting in vibration that restricts precision cutting
- Lack of focus on product presentation.
- Absence of active websites with updated product information with the SMEs.
- Non-availability of key tests pertaining to the attributes of the marble and granite materials.
- Lack of knowledge and understanding regarding stones application.

1b. USAID FIRMS Project Engagement

FIRMS is assisting 12 SMEs in Charsadda, Peshawar, Islamabad, Muridke, and Karachi. The program objective is to increase the economic value of project-assisted SMEs with improvement in their manufacturing processes for 8 out of 12 SMEs resulting in optimal production with improved product quality for local and export markets. 4 SMEs based in Karachi were assisted only in marketing in local and international markets.

Planned Program Elements

6 SMEs in tile making and 2 SMEs in marble mosaic and handicraft are promised to be provided with machinery and equipment customized to their local requirements. In addition, they are provided with advisory support for improving the business through placing the production floor in order to introduce lean program to the SMEs. Exposure to all 12 SMEs is given by facilitating them in participating in local and foreign exhibitions. International exhibition include “Big 5” in Saudia Arabia and “Qatar Project” in Doha, Qatar.

PIFMS

Key Constraints

- Limited access to up to date crop advisory and market and weather information
- Difficulty in conducting efficient and safe financial transactions
- Limited interaction between buyers and sellers in distant domestic markets
- Difficulty in identifying new business

USAID FIRMS Project Engagement

FIRMS is assisting 1350 Farmers in 33 clusters in Swat by providing information on pre and post harvest technique/ best practices via SMS. A tripartite arrangement has been furnished between FIRMS project, Government of KPK (Agriculture Department) and Telenor Pakistan. The program objective is to increase knowledge of the farmers/ growers of Swat on Peach, Potato and Fisheries. The arrangement envisages establishment of TIC (trade information center) in Swat, manned by an expert whose salary expense will be picked by FIRMS project, while office and other essentials will be borne by KPK Government and Telenor will facilitate in uploading the messages as per crop calendar (software of which is developed by FIRMS). So far 15000 SMEs/ Farmers have benefitted from messaging program on pre and post harvest of Peach. Market information and financial solutions to the farmers is yet to be materialized while the program operations in Swat are already put on halt.

Planned Program Elements

SMEs are provided with Welding plants, Air Compressor, Press for straightening, material hardness tester and gauges. In addition, they are provided with 1. Advisory support for improving the business through placing the production floor in order by introducing lean program and providing on the job training on machinery and equipment provided to the SMEs. 2. Providing the client some essential machinery, equipment and tools as mentioned above, that will improve the productivity at optimal scale. 3. Exposure to SMEs through visits to local best practice firms like Atlas Honda/ Infinity/ GTDMC/Beco Engineering. And to participate in the international exhibition and specially tailored meeting visits to the production sites of benchmark countries.

5. Conclusion and Recommendations

Agriculture Implements

The management of FIRMs projects should not focus on institutionalizing the interventions through;

- a) Development of linkages between the industries associations with the provincial and federal government establishments (like TUSDEC, SMEDA and others mentioned in the intuitional mapping) through a window that has to be established with in the secretariat of clustered association both in Daska and Faisalabad;.
- b) Advisory support intervention can be sustained by making full-fledged arrangements with SMEDA that will help in identifying various donors and other initiative which would help in promoting best industrial practices of these SMEs at the time of need.
- c) TDAP can be approached through the chamber of commerce and industries in Faisalabad and Sialkot for participation of Agri implement SMEs in the international exhibition to introduce their products. TDAP can also help facilitating the delegation of these SMEs for their exposure visits to the leading countries that make agriculture implements.

Marble and Granite Sector

The management of FIRMs projects should focus on institutionalizing the interventions through;

- a) We cannot for sure say at this point in time as to whom should be considered for phase over as all the institutional framework available for this sector is not very supportive and that it lacks capacity too.
- b) Advisory support intervention can be sustained by making full-fledged arrangements with SMEDA that will help in identifying various donors and other initiative which would help in promoting best industrial practices of these SMEs at the time of need.
- c) TDAP can be approached through Firms project and linked with APMIA for facilitating the exporting SMEs in the sector

PIFMS

SMS intervention could have played its role more effectively had the plan been verified at each stage by the beneficiaries.

Government/ Army should be taken on board for resuming the tasks to achieve the project goal.

6. Annexure

Annex -A Developing Sector-Level Exit Plans

The template provided in this annex comprises a set of seven tables. Each table should be completed by the respective sector team in consultation with VCD component management and any consultants retained to support the development of sector-level exit plans. Ultimate responsibility for completing the tables should rest with the sector team lead. Guidance for completing each table is provided below.

** Note that nothing should be changed in the shaded cells in the template tables. Information is only to be put in the white or lightly shaded cells. If there are not enough rows in the table(s) then additional rows should be added from the bottom.*

Table 1: Completing Planned Activities and Resolving Outstanding Issues

Table 1 is designed to facilitate the activities discussed in sections 3.2.1 and 3.2.2 of the overall exit strategy. Information from the tables in section 4.1 provides a starting point for completing the table for each sector, but the teams should make sure to review notes and correspondence, etc! to make sure that all items have been captured in the table. Once all activities and issues have been listed in the table, the teams should fill in the remaining columns for each item to clarify status and establish target dates.

Table 2: Completing the Sector Summary Document

Table 2 is designed to facilitate the activities discussed in section 3.2.3 of the overall exit strategy. Information from the tables that have been included in Annex C of this document can be used as a starting point for completing the table for each sector, but the teams should make sure to also review files to make sure that everything is captured. Again, as all the items are listed in the table the teams should fill in remaining columns for each item.

Table 3: Preparing The Program Beneficiaries For Sustainability Assessment

Table 3 is designed to initiate the assessment described in section 3.3 of the overall exit strategy. Each beneficiary for the sector program should be included. The table is important because the VCD sustainability process establishes milestones around repeat orders in target markets and the realization of business benefits. In order for a beneficiary to move from Phase 3 to Phase 4 of the process a target product(s) and target market(s) that require utilization of the Firms assistance need to be established.

Table 4: Assessing Beneficiary Progress Against the VCD Program Sustainability Process

Table 4 is designed to complete the assessment described in section 3.3 of the overall exit strategy. Each beneficiary's current status (as of June 30th) with respect to the milestones needs to be assessed, as well as their projected status as of Sep 30th and Dec 31st. Each beneficiary should be listed only once in each of the three status columns pertaining to the three quarters. The beneficiary should be listed in the furthest row down where each of the milestones for that stage has been completed.

Note that there is a set of exhibits in section 4.2 of the main document that attempt to depict progress against milestones. These should not be used for the purpose of completing the sector-level plan as they are summary level and not based on a review of actual data to indicate whether specific milestones have been achieved. The table in the exit plan needs to be much more precise.

Table 5: Reinforcing Program Sustainability through Broad Institutional Engagement

Table 5 is designed to facilitate the reinforcing sustainability aspects of institutional engagement activities that are described in section 3.5 of the overall exit strategy. Initial information to complete the table can be obtained from the tables in section 4.4 of the main document. This should be complemented with discussions among team and management to complete the overall picture.

Table 6: Managing The Program's Portfolio of Development Assets

Table 6 is designed to complete the assessment that is described in section 3.4 of the overall exit strategy, as well as the leveraging and scaling aspects of the institutional engagement activities that are described in section 3.5 of the overall exit strategy. Initial information to complete the table can be obtained from exhibits in section 4.3 of the main document and the tables in section 4.4 of the main document. As with the other elements of sector level plans, populating the table should be complemented with discussions among team and management to complete the overall picture.

Table 7: Action Plan and Task List

Table 7 is designed to enable the teams to turn everything that is recorded in Tables 1 through 6 into consistently structured action items. The approach to completing Table 7 includes the following steps:

- For each planned activity included in Table 1 list the specific tasks required to complete the activity and assign responsibility and a target date. If necessary or relevant, include a description of the task and status information in the space provided.
- For each outstanding issue included in Table 1 list the specific tasks required to resolve the issue and assign responsibility and a target date. If necessary or relevant, include a description of the task and status information in the space provided.
- Every sector team should prepare a summary document (or sector final report) as discussed in section 3.2.3 of the main document. Table 2 provides most of the information required to establish the table of contents for that summary document. The tasks involved with writing the summary document and editing/approving the summary document should be listed in Table 7 with responsibilities assigned and target dates assigned.
- Every sector team needs to prepare its beneficiaries for the sustainability assessment as discussed in section 3.3 of the main document (and captured in Table 3 of the template). The tasks involved with completing Table 3 should be listed in Table 7 with responsibilities assigned and target dates assigned.
- Every sector team needs to assess its beneficiaries against the VCD Sustainability Process as discussed in section 3.3 of the main document (and captured in Table 4 of the template). The tasks involved with completing Table 4 should be listed in Table 7 with responsibilities assigned and target dates assigned.
- Every sector team needs to identify a list of potential organizations to provide external support according to the roles defined alongside the VCD Sustainability Process. External support organizations should be identified for recruiting for all roles where there are still beneficiaries listed in the respective stage in the far right column of Table 4. The tasks involved with completing Table 5 should be listed in Table 7 with responsibilities assigned and target dates assigned.
- Every sector team needs to identify its development assets. In addition, each team needs to identify the organizations that might be engaged to deploy those assets. External organizations should be identified for recruiting for all roles for each asset that the team wishes to deploy. The tasks involved with completing Table 6 should be listed in Table 7 with responsibilities assigned and target dates assigned.
- Finally, each team will need to plan for outreach efforts to try and recruit and engage the organizations outlined in Table 5 and Table 6. The tasks involved with scheduling these meetings with potential partners, having the meetings, and following up on those meetings should all be listed in Table 7 with responsibilities assigned and target dates assigned.

Table 1: Completing Planned Activities and Resolving Outstanding Issues							
Planned Activities Still Remaining				Outstanding Issues			
#	Description of Planned Activity	Status / Comments	Target Date	#	Description of Outstanding Issue	Status / Comments	Target Date
1				1			
2				2			
3				3			
4				4			
5				5			
6				6			
7				7			
8				8			
9				9			
10				10			
11							
12							
13				13			
14				14			
15				15			
16				16			
17				17			

Table 2: Completing the Sector Summary Document							
Summary of Key Documents				Summary of Key Activities Completed			
#	Document Name	Date (s)	Description of Document	#	Activity Name	Date(s) of Activity	Description of Activity
1				1			
2				2			
3				3			
4				4			
5				5			
6				6			
7				7			
8				8			
9				9			
10				10			
11				11			
12				12			
13				13			
14				14			
15				15			

Table 3: Preparing The Program Beneficiaries For Sustainability Assessment

#	Company Name	Support Provided through FIRMS Intervention	Baseline Jobs (# FTEs)	Baseline Sales / month (\$ US)	Market(s) Targeted with FIRMS Intervention	Product(s) Targeted with FIRMS Intervention
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						

Table 4: Assessing Beneficiary Progress Against the VCD Program Sustainability Process

VCD Program Sustainability Process			Name of Beneficiary SMEs Achieving All Milestones By:		
#	Stage Name	Milestones to Graduate	(actual) June 30, 2014	(estimated) September 30, 2014	(estimated) December 31, 2014
1	Recognition. Beneficiaries are generally unaware of the business benefits associated with adopting new technologies, new processes, new management tools, new market linkages.	✓ Participation Agreement(s) Signed with Project	<ul style="list-style-type: none"> This should be N/A in most cases 	<ul style="list-style-type: none"> This should be N/A in all cases 	<ul style="list-style-type: none"> This should be N/A in all cases
2	Acquisition. Beneficiaries are aware of the business benefits of the solution(s) and working with the program to actively secure the support that is required to acquire them and realize the business benefits.	<ul style="list-style-type: none"> ✓ Delivery & Acceptance of All Project Support ✓ Beneficiary Fulfillment of All Cost Share Requirements ✓ Tech. & Equipment all Functioning According to Specifications 	<ul style="list-style-type: none"> There will still be quite a few companies in this stage in each program where key activities are still outstanding. 	<ul style="list-style-type: none"> This should be N/A in most cases 	<ul style="list-style-type: none"> This should be N/A in most cases
3	Adoption. Beneficiaries have acquired the solution(s) and are actively working to develop competence in employing the solutions such that the business benefits are realized. <u>Mistakes and setbacks are common in this stage.</u>	<ul style="list-style-type: none"> ✓ Target Buyers and Markets Selected ✓ Repeat Orders from Target Buyers & Markets Fulfilled ✓ Business Benefits Realized on the Top & Bottom Line 	<ul style="list-style-type: none"> TBD 	<ul style="list-style-type: none"> TBD 	<ul style="list-style-type: none"> TBD
4	Integration. Beneficiaries have become comfortable and competent employing the solution(s) and have started to realize the business benefits. Focus is now seamless incorporation into business operations.	<ul style="list-style-type: none"> ✓ Business Benefits Sustained on the Top & Bottom Line ✓ Demonstrated Alignment in Term of Systems, Culture & People ✓ Long Run Financial Viability of the Solution Established 	<ul style="list-style-type: none"> TBD 	<ul style="list-style-type: none"> TBD 	<ul style="list-style-type: none"> TBD
5	Sustainability. Beneficiaries developed sufficient capacity and commitment that the intervention is now clearly		<ul style="list-style-type: none"> TBD 	<ul style="list-style-type: none"> TBD 	<ul style="list-style-type: none"> TBD

Table 4: Assessing Beneficiary Progress Against the VCD Program Sustainability Process					
VCD Program Sustainability Process			Name of Beneficiary SMEs Achieving All Milestones By:		
#	Stage Name	Milestones to Graduate	(actual) June 30, 2014	(estimated) September 30, 2014	(estimated) December 31, 2014
	market sustainable.				

Table 5: Reinforcing Program Sustainability through Broad Institutional Engagement

VCD Program Sustainability Process			Institutions To Consider to Fill The External Assistance Roles	
#	Stage / Milestones to Graduate	External Assistance Role	Institutions To Consider for Lead Role	Institutions to Consider for Supporting Role
1	Recognition <ul style="list-style-type: none"> ✓ Participation Agreement(s) Signed with Project 	Design. Focus is on analysis, recruitment of the program beneficiaries, developing specifications, and testing the solution(s), developing a budget, structuring agreements with beneficiaries.	<ul style="list-style-type: none"> • This should be N/A in all cases 	<ul style="list-style-type: none"> • This should be N/A in all cases
2	Acquisition <ul style="list-style-type: none"> ✓ Delivery & Acceptance of All Project Support ✓ Beneficiary Fulfillment of All Cost Share Requirements ✓ Tech. & Equipment all Functioning According to Specifications 	Implement. This is the execution stage for external support providers; it is often portrayed as the delivery stage. Delivery of hard goods and also training delivery and execution of capacity building consultancies.	<ul style="list-style-type: none"> • This should be N/A in most cases 	<ul style="list-style-type: none"> • This should be N/A in most cases
3	Adoption <ul style="list-style-type: none"> ✓ Target Buyers and Markets Selected ✓ Repeat Orders from Target Buyers & Markets Fulfilled ✓ Business Benefits Realized on the Top & Bottom Line 	Support. Post delivery stage is focused on support and problem solving with beneficiaries. This is where setbacks and mistakes are common so key roles for external support providers in this stage are reinforcement and encouragement to beneficiaries.	<ul style="list-style-type: none"> • TBD 	<ul style="list-style-type: none"> • TBD
4	Integration <ul style="list-style-type: none"> ✓ Business Benefits Sustained on the Top & Bottom Line ✓ Demonstrated Alignment in Term of Systems, Culture & People ✓ Long Run Financial Viability of the Solution Established 	Monitor. Once beneficiaries have crossed into this stage the reliance on external support providers tends to decline rapidly and significantly. The focus of the external support provider at this point is on collaboration and opportunities to leverage results.	<ul style="list-style-type: none"> • TBD 	<ul style="list-style-type: none"> • TBD
5	Sustainability	Evaluate.	<ul style="list-style-type: none"> • TBD 	<ul style="list-style-type: none"> • TBD

Table 5: Reinforcing Program Sustainability through Broad Institutional Engagement				
VCD Program Sustainability Process			Institutions To Consider to Fill The External Assistance Roles	
#	Stage / Milestones to Graduate	External Assistance Role	Institutions To Consider for Lead Role	Institutions to Consider for Supporting Role
		Leverage. Scale.		

Table 6: Managing The Program's Development Assets In Order To Be Leveraged and Scaled						
Development Assets To Leverage or Scale			Institutions To Recruit To Play The Key Roles of the VCD Program Sustainability Process			
#	Asset Category	Asset Name / Description	Design	Implement	Support	Monitor
			Focus is on analysis, recruitment of the program beneficiaries, developing specifications, and testing the solution(s), developing a budget, structuring agreements with beneficiaries.	This is the execution stage for external support providers; it is often portrayed as the delivery stage. Delivery of hard goods and also training delivery and execution of capacity building consultancies.	Post delivery stage is focused on support and problem solving with beneficiaries. This is where setbacks and mistakes are common so key roles for external support providers in this stage are reinforcement and encouragement to beneficiaries.	Once beneficiaries have crossed into this stage the reliance on external support providers tends to decline rapidly and significantly. The focus of the external support provider at this point is on collaboration and opportunities to leverage results.
1	New Products, Services, Process, etc...					
2						
3						
4	New Markets, Buyers, Marketing Channels, etc...					
5						
6						
7	Similar Sectors					

Table 6: Managing The Program's Development Assets In Order To Be Leveraged and Scaled						
Development Assets To Leverage or Scale			Institutions To Recruit To Play The Key Roles of the VCD Program Sustainability Process			
#	Asset Category	Asset Name / Description	Design	Implement	Support	Monitor
			Focus is on analysis, recruitment of the program beneficiaries, developing specifications, and testing the solution(s), developing a budget, structuring agreements with beneficiaries.	This is the execution stage for external support providers; it is often portrayed as the delivery stage. Delivery of hard goods and also training delivery and execution of capacity building consultancies.	Post delivery stage is focused on support and problem solving with beneficiaries. This is where setbacks and mistakes are common so key roles for external support providers in this stage are reinforcement and encouragement to beneficiaries.	Once beneficiaries have crossed into this stage the reliance on external support providers tends to decline rapidly and significantly. The focus of the external support provider at this point is on collaboration and opportunities to leverage results.
8	or Regions to Apply the Intervention Model					
9						
10	Scalable Models to Be Developed					
11						

Table 7: Action Plan and Task List

#	Task / Activity	Description (If Necessary)	Person Responsible	Target Date / or Deadline	Status / Comments / Issues	Done
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						

Annex-B Institutional Mapping

USAID Pakistan
Commercial Agriculture Project (CAP)
Agribusiness Support Project (UAP)
Commodity Import Project (CIP)
Punjab Enabling Environment Project (PEEP)
Sindh Enabling Environment Project (SEEP)
Youth Workforce Development Project
Trade Project
SME / BDS / Entrepreneurship Project
Financial Sector Project
AusAID ASLP GIZ Training Centers of the Bavarian Employers' Association (BFZ) Senior Experten Services (SES) JICA Asian Productivity Organization (APO)
World Bank World Bank Punjab Irrigation Program Economic Revitalization for FATA and KPK
United Nations United Nations Industrial Development Organization (UNIDO) United Nations Development Program (UNDP)
International NGOs

...

Local NGOs

...

Ministry of Commerce

Pakistan Institute of Trade and Development (PITD)

Trade Development Authority of Pakistan (TDAP)

Agriculture Committees

Ministry of Industry and Production

Pakistan Industrial Development Corporation (PIDC)

National Industrial Parks Development & Management Company (NIP)

Technology Up gradation and Skill Development Company (TUSDEC)

Pakistan Stone Development Company (PASDEC)

Small & Medium Enterprise Development Authority (SMEDA)

CFC for Light Engineering Cluster Marda

Marble Mosaic Centers

Investment Promotion Unit

Pakistan Industrial Technical Assistance Center (PITAC)

Ministry of National Food Security and Research

Pakistan Agricultural Research Council (PARC)

National Agricultural Research Center (NARC)

Farm Machinery Institute

Technology Transfer Institute (TTI)

National Linkages Initiative

Agriculture Policy Institute (API)

Ministry of Science & Technology

Pakistan Council of Scientific & Industrial Research (PCSIR)

Cast Metal & Foundry Technology Center (CM&FT) Daska

Dimension Stones Evaluation Center (DSEC) Peshawar

Pakistan Standards and Quality Control Authority (PSQCA)

Agriculture Department

Punjab Agricultural Research Board

Extension & Adaptive Research

Agricultural Mechanization Research Institute (AMRI) Multan

Center for Agriculture Machinery Industries (Mian Channu)
Promotion

Technical, Education & Vocational Training Authority (TEVTA)

Punjab Vocational Training Centers (PVTC)

Agriculture Department

Agriculture Mechanization Research Cell (AMRC) Tandojam

Board of Investment

Enterprise Development Cell

Technical, Education & Vocational Training Authority (TEVTA)

Agriculture Department

Agricultural Research System (ARS)

Hyatabad Industrial Estate (Peshawar)

Material Testing Laboratory

University of Peshawar

Center of Excellence in Geology

Geology Department

University of Agriculture, Faisalabad

Ayuh Agricultural Research Institute

Sustainable Development Policy Institute (SDPI)**Pakistan Institute of Development Economics (PIDE)**

...

Marble & Granite**Ag Implements**



Sialkot Chamber of Commerce and Industry

Faisalabad Chamber of Commerce and Industry



Pakistan Foundry Association

All Pakistan Marble Industry Association

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USAID Firms Project

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